

Worksheet for the Wisconsin Public Library System Annual Report

Reporting Library System Activities for 2015

This worksheet can be used to compile information before entering library system annual report data into LibPAS. All data entry fields are listed. Subtotal and total fields that are automatically calculated by LibPAS are not listed. Where information is provided by selecting a response from radio buttons or a dropdown list, the choices are shown; e.g., Yes / No.

This worksheet does not replace the online annual report or the printed PDF report and cannot be accepted by the DPI.

System annual report instructions are online at dpi.wi.gov/sites/default/files/imce/pld/pdf/sysannrptinstr.pdf.

For additional information, see dpi.wi.gov/pld/data-reports/annual-report#sys_rpt.

I. GENERAL INFORMATION

| | |
|---|------------------|
| 1. System Name | |
| Salutation | Mr. / Ms. / Mrs. |
| 2. System Director Name | |
| 3. Certification Grade | Gr1 |
| 4. Certification Expiration Date | |
| 5. Street Address | |
| 6. System Phone No. | |
| 7. Fax No. | |
| 8. Mailing Address or PO Box | |
| 9. System Website URL | http:// |
| 10. Director's System E-mail Address | |
| 11. City/Village/Town | |
| 12. County | |
| 13. ZIP+4 Code | |
| 14. No. of Public Libraries Participating in the System | |
| 15. Does the system operate a books-by-mail program? | Yes / No |
| 16. No. of Bookmobiles Owned | |
| 17. Estimated System Registered Users | |
| 18. DUNS Number | |

II. SYSTEM COLLECTION

| | |
|---|--|
| 1a. Books in Print (end of year total) | |
| 1b. Books in Print Added During Year | |
| 2a. Audio Materials (end-of-year total) | |
| 2b. Audio Added During Year | |
| 3a. Video Materials | |
| 3b. Video Added During Year | |
| 4. System Licensed Online Databases (number available to members) | |
| 5. System Licensed E-books | |
| 6. System Licensed Electronic Audio Materials (downloadable) | |
| 7. System Licensed Electronic Video Materials (downloadable) | |
| 8. Subscriptions (Includes periodicals and newspapers, but excludes those in electronic format) | |

III. SYSTEM SERVICES

| | | |
|--|--|--|
| 1. Total Annual Circulation | | |
| 2a. Items Loaned (provided to) | | |
| 2b. Items Received (received from) | | |
| 3. Use of System Electronic Resources | | |
| a. Uses of E-Books by Users of Your System | <input type="checkbox"/> Not available | |
| b. Uses of E-Audio by Users of Your System | <input type="checkbox"/> Not available | |
| c. Uses of E-Video by Users of Your System | <input type="checkbox"/> Not available | |
| d. Number of Licensed Database Sessions | <input type="checkbox"/> Not available | |

IV. SYSTEM BOARD AND ORGANIZATION

System Board President

| Salutation | First Name | Last Name | Street Address | City | ZIP Code | Email Address |
|--------------|------------|-----------|----------------|------|----------|---------------|
| 1. Mr. / Ms. | | | | | | |

System Board Members

| Salutation | First Name | Last Name | Street Address | City | ZIP Code | Email Address |
|---------------|------------|-----------|----------------|------|----------|---------------|
| 2. Mr. / Ms. | | | | | | |
| 3. Mr. / Ms. | | | | | | |
| 4. Mr. / Ms. | | | | | | |
| 5. Mr. / Ms. | | | | | | |
| 6 Mr. / Ms. | | | | | | |
| 7. Mr. / Ms. | | | | | | |
| 8. Mr. / Ms. | | | | | | |
| 9. Mr. / Ms. | | | | | | |
| 10. Mr. / Ms. | | | | | | |
| 11. Mr. / Ms. | | | | | | |
| 12. Mr. / Ms. | | | | | | |
| 13. Mr. / Ms. | | | | | | |
| 14. Mr. / Ms. | | | | | | |
| 15. Mr. / Ms. | | | | | | |
| 16. Mr. / Ms. | | | | | | |
| 17. Mr. / Ms. | | | | | | |
| 18. Mr. / Ms. | | | | | | |
| 19. Mr. / Ms. | | | | | | |
| 20. Mr. / Ms. | | | | | | |
| 21. Mr. / Ms. | | | | | | |
| 22. Mr. / Ms. | | | | | | |
| 23. Mr. / Ms. | | | | | | |

V. PUBLIC LIBRARY SYSTEM INCOME**1. County Government****a. System Member County Appropriations Received by Library System**

| County Name | Amount |
|-------------|--------|
| 1. | |
| 2. | |
| 3. | |
| 4. | |
| 5. | |
| 6. | |
| 7. | |
| 8. | |
| 9. | |
| 10. | |

b. Other County Payments Received

| County Name | Amount |
|-------------|--------|
| 1. | |
| 2. | |
| 3. | |
| 4. | |
| 5. | |

2. State Aid to Public Library Systems**3. Other State Funded Programs**

| Description | Amount |
|-------------|--------|
| a. | |
| b. | |
| c. | |

4. Federal Aid — Program name and, if LSTA, project number.

| Project Number | Program or Project | Amount |
|----------------|--------------------|--------|
| a. | | |
| b. | | |
| c. | | |
| d. | | |
| e. | | |
| f. | | |
| g. | | |
| h. | | |
| i. | | |
| j. | | |

5. Contract Income from Other Governmental Units, Libraries, Library Agencies, Library Systems, etc.

| Name | Amount |
|------|--------|
| a. | |
| b. | |
| c. | |
| d. | |
| e. | |
| f. | |
| g. | |
| h. | |
| i. | |
| j. | |

6. Other Income

| | |
|--|--|
| Unexpended State Aid from Previous Year(s) | |
| Interest Earned from State Aid Funds Investments | |
| All Other Unexpended Funds from Previous Year(s) | |
| Interest Earned from Other Fund Investments | |
| Gifts and Endowments to the System | |
| All Other Sources | |

VI. PUBLIC LIBRARY SYSTEM EXPENDITURES

| | System State Aid | Other State and Federal Aid | All Other |
|-----------------------|------------------|-----------------------------|-----------|
| 1. Salaries and Wages | | | |
| 2. Employee Benefits | | | |

3. Library Collection Expenditures

| | | | |
|--------------------------------|--|--|--|
| a. Print Materials | | | |
| b. Electronic Materials | | | |
| c. Audiovisual Materials | | | |
| d. All Other Library Materials | | | |

| | | | |
|--|--|--|--|
| 4. System Contract Expenditures | | | |
| 5. System Payments to Member Libraries | | | |
| 6. All Other Operating Expenditures | | | |
| 7. Total Operating Expenditures | | | |
| 8. System Capital Expenditures | | | |

VII. SYSTEM MEMBER COUNTY APPROPRIATIONS FOR LIBRARY SERVICE

| County Name | 2014 Amount |
|-------------|-------------|
| 1. | |
| 2. | |
| 3. | |
| 4. | |
| 5. | |
| 6. | |
| 7. | |
| 8. | |
| 9. | |
| 10. | |

VIII. SYSTEM EVALUATION AND CERTIFICATION OF COMPLIANCE

Membership Agreements

| | |
|--|----------|
| (a) Written agreements that comply with s. 43.15(4)(c)4. with all member libraries. | Yes / No |
| Copies of the most recent agreements have been filed with the Division for Libraries and Technology. | Yes / No |

Resource Library Agreement

| | |
|--|----------|
| (b) Backup reference, information, and interlibrary loan services from the system resource library, including the development of and access to specialized collections, as evidenced by a written agreement with that library. | Yes / No |
| Signed copies of the 2014 and 2015 resource library agreements have been filed with the division. | Yes / No |

| | |
|--------|-----------|
| Others | Narrative |
|--------|-----------|

Reference Referral and Interlibrary Loan

| | |
|---|----------|
| S. 43.24(2)(d) Referral or routing of reference and interlibrary loan requests from libraries within the system to libraries within and outside the system. | Yes / No |
| Reimbursed member libraries for ILL | Yes / No |
| Maintained ILL Clearinghouse | Yes / No |
| Contracted for ILL Clearinghouse | Yes / No |
| Maintained a shared database of member library bibliographic records and holdings | Yes / No |
| Utilized WISCAT to promote interlibrary loan | Yes / No |
| Maintained a system interlibrary loan plan | Yes / No |

| | |
|--------|-----------|
| Others | Narrative |
|--------|-----------|

| | |
|----------------|-----------|
| Other Comments | Narrative |
|----------------|-----------|

Inservice Training

| | |
|---|----------|
| S. 43.24(2)(e) Inservice training for participating public library personnel and trustees. Indicate with a check those services carried out by your system in 2014 in conjunction with this service requirement. | Yes / No |
| Conducted workshops for member library staff and trustees | Yes / No |
| Maintained a calendar of CE events | Yes / No |
| Provided scholarships and grants for member library staffs | Yes / No |
| Maintained a professional collection for system and member library staffs | Yes / No |

| | |
|---|----------|
| S. 43.24(2)(h) Professional consultant services to participating public libraries | Yes / No |
| Public library administration and governance | Yes / No |
| Adult services | Yes / No |
| Youth services | Yes / No |
| Library automation | Yes / No |
| Building and remodeling | Yes / No |
| Technical services | Yes / No |
| Interlibrary loan and resource sharing | Yes / No |
| Staff development (certification, CE, etc.) | Yes / No |
| Planning and evaluation, standards | Yes / No |
| Collection development | Yes / No |
| Legal issues | Yes / No |
| Public relations | Yes / No |
| Reference and information services | Yes / No |
| Special needs | Yes / No |

| | |
|----------------|-----------|
| Others | Narrative |
| Other Comments | Narrative |

Delivery and Communication

| | |
|---|----------|
| S. 43.24(2)(fm) Electronic delivery of information and physical delivery of library materials to participating libraries. | Yes / No |
| Had regular courier or van delivery service | Yes / No |
| Provided an 800 number, phone credit card, or accepted collect calls | Yes / No |

ILL transactions sent by:

| | |
|---------------------------|----------|
| Email | Yes / No |
| OCLC | Yes / No |
| Regional automated system | Yes / No |
| WISCAT | Yes / No |

| | |
|--|----------|
| Used fax for document delivery/communication | Yes / No |
| Used mail as primary delivery system | Yes / No |
| Published a newsletter | Yes / No |

| | |
|----------------|-----------|
| Others | Narrative |
| Other Comments | Narrative |

Service Agreements

| | |
|--|----------|
| S. 43.24(2)(g) Service agreements with all adjacent library systems | Yes / No |
| Copies of the most recent agreements have been filed with the Division for Libraries and Technology. | Yes / No |
| Reciprocal borrowing between systems | Yes / No |
| Cash payments in cross-system lending | Yes / No |
| Continuing education | Yes / No |
| Delivery | Yes / No |
| Newsletter exchange | Yes / No |
| Cooperative planning/information exchange | Yes / No |
| Audiovisual services | Yes / No |

| | |
|------------------------|-----------|
| Cooperative purchasing | Yes / No |
| Others | Narrative |
| Other Comments | Narrative |

Services to Users with Special Needs

| | |
|--|-----------|
| S. 43.24(2)(k) Promotion and facilitation of library service to users with special needs | Yes / No |
| Summary of Services or Initiatives | Narrative |
| Agencies with which the system had the most contact | Narrative |
| Continuing Education | Narrative |
| Other Comments | Narrative |

Other Types of Libraries

| | |
|--|-----------|
| S. 43.24(2)(L) Cooperation and continuous planning with other types of libraries in the system area which results in agreements with those libraries for the appropriate sharing of library resources to benefit the clientele of all libraries in the system area. | Yes / No |
| An advisory committee or planning group including representatives from other types of libraries met and established objectives relating to this requirement for the plan year. | Yes / No |
| The system has agreements with other types of libraries, or if the system participates in a cooperation agreement with a multitype organization to meet the purposes of this goal, there is established a clear link between the system and the individual members of the multitype organization. Copies of the most recent agreements have been filed with the Division for Libraries and Technology. | Yes / No |
| Consultation | Yes / No |
| Continuing education / workshops | Yes / No |
| ILL (Direct) | Yes / No |
| Union list of serials | Yes / No |
| Directory of libraries | Yes / No |
| Delivery services | Yes / No |
| Back-up reference services | Yes / No |
| Newsletter | Yes / No |
| Technical services | Yes / No |
| Others | Narrative |
| Other Comments | Narrative |

Library Technology and Resource Sharing Plan

| | |
|---|----------|
| S. 43.24(2)(m) Planning with the division and with participating public libraries and other types of libraries in the area in regard to library technology and the sharing of resources. By January 1, 2000, and every 5th January 1 thereafter, the public library system shall submit to the division a written plan for library technology and the sharing of resources. | Yes / No |
| Member public libraries and other types of libraries in the system area had an opportunity to review and comment on the plan. | Yes / No |
| The public library system's current technology and resource sharing plan has been filed with the Division for Libraries and Technology. | Yes / No |

Other Service Programs

| | |
|--|-----------|
| S. 43.24(2)(i) Any other service programs designed to meet the needs of participating public libraries and the residents of the system area, as determined by the public library board after consultation with participating public libraries. | Yes / No |
| Other Service Programs | Narrative |

Administration

| | |
|---|----------|
| The system did not expend more than 20 percent of the state aid received in 2014 for administration | Yes / No |
|---|----------|

IX. COLLABORATIVE ACTIVITIES

| Summary of Collaborative Activities | | Narrative |
|-------------------------------------|--------|-----------|
| Activity | Amount | |
| 1. | | |
| 2. | | |
| 3. | | |
| 4. | | |
| 5. | | |
| 6. | | |
| 7. | | |
| 8. | | |
| 9. | | |
| 10. | | |

X. PUBLIC LIBRARY SYSTEM ANNUAL PROGRAM EXPENDITURES—2014

| Program | System Aid, Carryover, and Interest Earned | Other State and Federal Library Program Funds | All Other Income |
|--|--|---|------------------|
| Technology, Reference and Interlibrary Loan | | | |
| 1. | | | |
| 2. | | | |
| 3. | | | |
| 4. | | | |
| Continuing Education and Consulting Service | | | |
| 1. | | | |
| 2. | | | |
| Delivery | | | |
| Library Services to Special Users | | | |
| Library Collection Development | | | |
| Direct Payment to Members for Nonresident Access | | | |
| Direct Nonresident Access Payments Across System Borders | | | |
| Library Services to Youth | | | |
| Public Information | | | |
| Administration | | | |
| Other System Programs | | | |
| 1. | | | |
| 2. | | | |
| 3. | | | |
| 4. | | | |

XI. SYSTEM STAFF (FTE)

1. Personnel Listing

a. Employees Holding the Title of Librarian as of December 31, 2014

| First Name | Last Name | Position | Type of Staff | Annual Salary | Hours Worked/Week |
|------------|-----------|----------|--------------------|---------------|-------------------|
| 1. | | Director | MLS (ALA) / No MLS | | |
| 2. | | | MLS (ALA) / No MLS | | |
| 3. | | | MLS (ALA) / No MLS | | |
| 4. | | | MLS (ALA) / No MLS | | |
| 5. | | | MLS (ALA) / No MLS | | |
| 6. | | | MLS (ALA) / No MLS | | |
| 7. | | | MLS (ALA) / No MLS | | |
| 8. | | | MLS (ALA) / No MLS | | |
| 9. | | | MLS (ALA) / No MLS | | |
| 10. | | | MLS (ALA) / No MLS | | |
| 11. | | | MLS (ALA) / No MLS | | |

b. Other Paid Staff

| Position | Annual Salary | Hours Worked/Week |
|----------|---------------|-------------------|
| 1. | | |
| 2. | | |
| 3. | | |
| 4. | | |
| 5. | | |
| 6. | | |
| 7. | | |
| 8. | | |
| 9. | | |
| 10. | | |
| 11. | | |
| 12. | | |
| 13. | | |
| 14. | | |
| 15. | | |
| 16. | | |
| 17. | | |
| 18. | | |
| 19. | | |
| 20. | | |
| 21. | | |
| 22. | | |
| 23. | | |
| 24. | | |

XII. SYSTEM MEMBERSHIP

| | |
|--|----------|
| Are the public library members established under the provisions of Chapter 43 of the Wisconsin Statutes? [s. 43.15(4)(c)1] | Yes / No |
| Are the public library members authorized by the municipal governing board to participate in the public library system? [s. 43.15(4)(c)3] | Yes / No |
| Have the library members maintained a written agreement to participate in the library system, ILL, and provide "same services"? [s. 43.15(4)(c)4] | Yes / No |
| Are the member libraries' head librarian certified at the appropriate grade level? [s. 43.15(4)(c)6 and Administrative Code Rules PI 6.03] | Yes / No |
| Have all counties participating in the system entered into written agreements with the system? [s. 43.15(4)(b)3] | Yes / No |
| Have all counties participating in the system adopted and maintained the plan of library service submitted and approved under s. 43.11(3) and s. 43.13(1)? [s. 43.15(4)(b)1] | Yes / No |
| Is each public library member open to the public an average of at least 20hrs/wk? [s. 43.15(4)(c)7] | Yes / No |
| Does each public library member annually spend at least \$2,500 on library materials? [s. 43.15(4)(c)8] | Yes / No |

XIII. CERTIFICATION OF STATUTORY COMPLIANCE

| | |
|---|----------|
| Is the library system board constituted and operated in compliance with s. 43.17(1) and (2) and s. 43.19(1)(a) and (b)? | Yes / No |
| Has the library system board appointed a head librarian who is responsible for administration of the public library system? [s. 43.17(4)] | Yes / No |
| Is the library system organized and operated in compliance with Wis. Stat. s. 43.15 Standards for public library systems? | Yes / No |

S. 43.24(2) For a public library system to qualify for and maintain its eligibility for state aid under this section, it shall ensure that all of the following are provided.

| | |
|---|----------|
| Does the system have written agreements that comply with s. 43.15(4)(c)4. with all member libraries? | Yes / No |
| Does the system provide backup services from the system resource library? [s. 43.24(2)(b)] | Yes / No |
| Does the system refer or route reference and interlibrary loan requests? [s. 43.24(2)(d)] | Yes / No |
| Does the system provide inservice training? [s. 43.24(2)(e)] | Yes / No |
| Does the system deliver electronic information and physical library materials? [s. 43.24(2)(fm)] | Yes / No |
| Does the system have service agreements with all adjacent library systems? [s. 43.24(2)(g)] | Yes / No |
| Does the system provide professional consultant services? [s. 43.24(2)(h)] | Yes / No |
| Does the system provide other service programs designed to meet library and resident needs? [s. 43.24(2)(i)] | Yes / No |
| Does the system promote and facilitate library services to users with special needs? [s. 43.24(2)(k)] | Yes / No |
| Does the system cooperate and plan with other types of libraries for sharing resources? [s. 43.24(2)(L)] | Yes / No |
| Does the system plan with the division and libraries about library technology and sharing resources? [s. 43.24(2)(m)] | Yes / No |
| Does the system reimburse no more than actual costs to libraries that provide interlibrary borrowing services to individuals from another library? [s. 43.24(2)(n)] | Yes / No |